



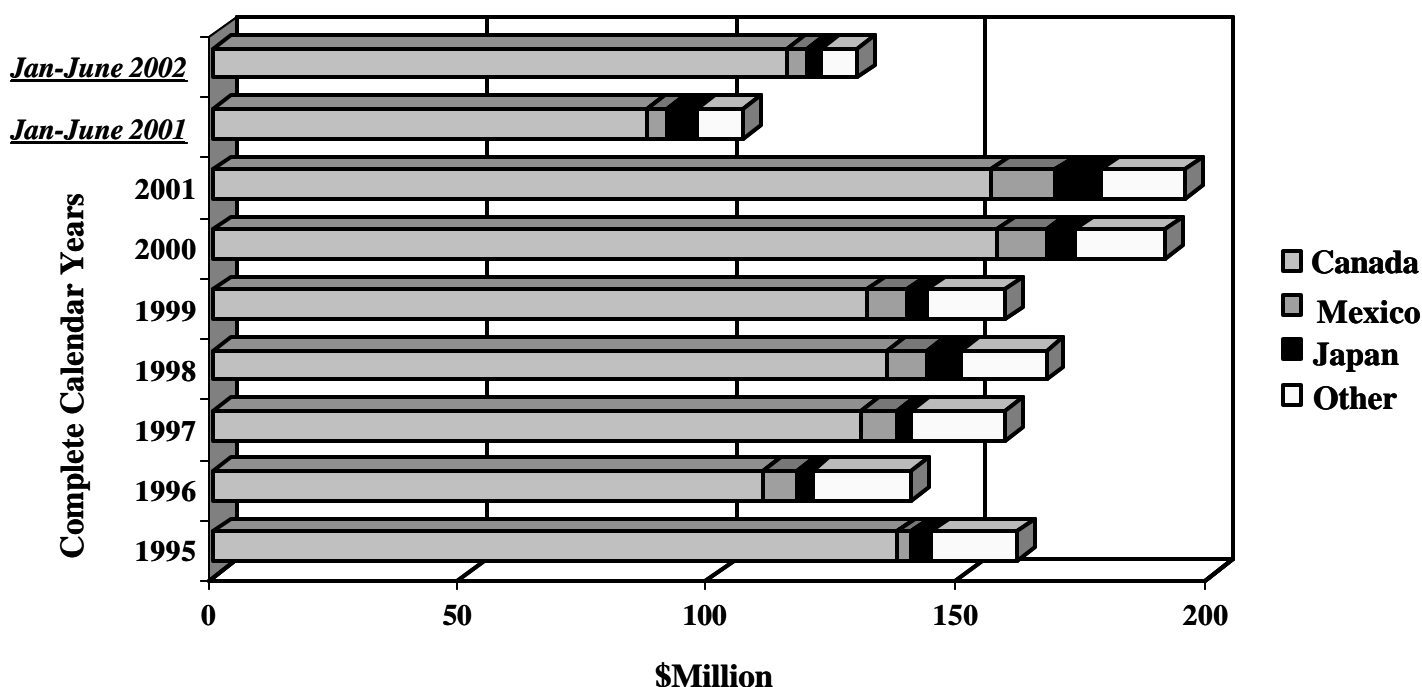
United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

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# World Horticultural Trade and U.S. Export Opportunities

## U.S. Exports of Lettuce Continue Their Upward Trend



Source: U.S. Bureau of the Census

Fresh lettuce continues to be one of the bright spots among U.S. horticultural exports. During the first 6 months of 2002, U.S. exports of lettuce were valued at nearly \$130 million, up 22 percent in value from the same period last year. Most U.S. fresh lettuce exports goes to Canada with shipments to that country valued at \$115 million during January-June 2002. During this same period, U.S. lettuce sales to Mexico, the United States second largest market, were valued at \$4 million, practically unchanged from the same period in 2001. U.S. lettuce shipments to Japan slowed down during the period January-June 2002 to just \$3 million. In Japan, the U.S.-type iceberg lettuce is heavily demanded by the expanding fast food industry. Since its climate does not allow for efficient production of this type of lettuce, Japan could be a significant market for the U.S. product. However, some of Japan's technical barriers to trade are limiting U.S. sales, mainly for fresh vegetables. The U.S. lettuce industry estimates that shipments to Japan could likely increase by \$100 million if some of the U.S.-Japan technical trade issues were resolved.

[Check Out the New U.S. Trade Internet System Website. Go to  
<http://www.fas.usda.gov/ustrade>]

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## **Export Summary**

### **June**

U.S. exports of horticultural products to all countries in June totaled \$982 million, an increase of 1 percent from June 2001. The categories with significant increases in June were edible tree nuts (up 20 percent to \$79 million) and fresh vegetables (up 10 percent to \$129 million). The categories with the most significant decreases were essential oils (down 25 percent to \$69 million), wine and beer (down 7 percent to \$63 million), and fruit and vegetable juices (down 4 percent to \$60 million).

June 2002 exports to Canada were up 9 percent from June 2001 to \$363 million. Exports to Korea climbed 36 percent to \$33 million while sales to Malaysia rose 12 percent to \$10 million). June exports to China dropped 20 percent to \$11 million) as exports to the EU were also down 10 percent to \$163 million). The Japanese market lost some ground (down 6 percent to \$155 million). Exports to Mexico dropped 2 percent to \$77 million compared to June 2001.

Exports for the fiscal year (FY) 2002 period were about even with the same period in FY 2001 at \$8.4 billion. Tree nut exports were up about 9 percent to \$955 million for the October-June 2001/02 period, while essential oils exports were up 6 percent to \$552 million, and fruit and vegetable juices rose about 5 percent to \$561 million. All other categories declined.

Exports to Canada rose 5 percent to \$2.7 billion for the October-June period, while exports to the EU were unchanged at \$1.6 billion and exports to Mexico rose 5 percent to \$730 million. Exports to Japan, Hong Kong, and Taiwan dropped 8 percent, 13 percent, and 20 percent, respectively compared with the same period in FY 2001. The fastest growing markets for FY 2002 to date include: Russia, up 76 percent, India, up 30 percent, Korea, up 24 percent, the Dominican Republic, up 16 percent, Colombia, up 16 percent, Jamaica, up 14 percent, the United Arab Emirates, up 14 percent, Israel up 8 percent, and China, up 3 percent.

To access FAS Attaché Reports online, please reference the following Internet address:

<http://www.fas.usda.gov/scripts/attacherep/default.asp>

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries. Search by keyword, including country and commodity.

### **Visit the HTP Homepage!**

The Horticultural & Tropical Products (HTP) Division Homepage is updated weekly to bring the latest information to the public as efficiently as possible. The site contains information on policy and technical developments affecting trade in horticultural commodities, as well as selected reports submitted by FAS overseas offices and special reports prepared by the division. The information typically remains on the site for approximately one week, before being archived. For further information on this site, please contact Nancy Hirschhorn (202) 720-2974. Go to <http://www.fas.usda.gov/http>.

## **SPECIAL ANNOUNCEMENTS!!!**

### **USDA Launches Production, Supply, and Demand Database Site**

WASHINGTON, Aug. 26, 2002 – The Foreign Agricultural Service (FAS) announced a new on-line database web site that provides current and historical USDA data on production, supply and distribution of agricultural commodities for the United States and key producing and consuming countries.

The data, which goes back as far as 1960, provides users with a complete global picture--all commodity-specific attributes, countries and years are available. Users can view all facets of the database onscreen or download to a spreadsheet file. Pre-defined tables categorized by commodity groups are readily available, or the user can create custom queries for specific commodities. *Example: Barley*

<i>Argentina</i>	<i>2001</i>	<i>2002</i>
<i>Area harvested</i>	<i>240</i>	<i>250</i>
<i>Production</i>	<i>510</i>	<i>600</i>
<i>Yield</i>	<i>2.13</i>	<i>2.4</i>

The site includes 108 commodity groups and over 190 countries. The information will be particularly useful for commodity traders, agriculture importers, exporters, economists, producers, and researchers who can use the information to determine future prices, production levels, and demand for agricultural products.

The production, supply, and demand database site can be found at Internet address: <http://www.fas.usda.gov/psd>

For further information, please E-mail: [PSDOnline@fas.usda.gov](mailto:PSDOnline@fas.usda.gov)

**Foodapest (Budapest, Hungary – November 26-29, 2002).**

The U.S. Department of Agriculture/Foreign Agricultural Service (USDA/FAS) is organizing a U.S. Pavilion at the **Foodapest** trade show in Budapest, Hungary. Products identified as having excellent market potential in Central Europe include nuts (almonds, peanuts, pecans), raisins and dried fruits (cranberries, prunes), seafood, distilled liquors, snack foods, prepared sauces and condiments, and miscellaneous grocery items. There are a variety of ways you can participate: purchase booth space in the U.S. Pavilion; order a customized package of meetings with potential business partners under our Dialogue Concept; or participate in the American Café. What is an American Café? For a small fee of \$350, your sample products can be prepared and distributed at the show to potential customers by USDA/FAS staff. Immediately after the show USDA/FAS sends feedback and leads, providing you with the opportunity to follow up with potential buyers. For more information on any of these options, contact Sharon Cook/FAS Trade Show Office at 202-720-3425 or [Sharon.Cook@usda.gov](mailto:Sharon.Cook@usda.gov).

**International Food and Drink Exhibition (London, United Kingdom – March 23-26, 2003).**

**The International Food and Drink Exhibition (IFE)** is the United Kingdom's (U.K.) leading food and drink trade exhibition. A biennial event, **IFE** attracts approximately 38,000 visitors. **IFE** has a reputation for attracting U.K. buyers from key sectors of interest to U.S. companies – importers, retailers, and foodservice buyers. It is particularly useful for new-to-market companies with shelf-stable or frozen grocery products. Best product prospects include: wine, beer, tree nuts, processed fruits and vegetables, fresh fruit, sauces and marinades, confectionery, snack foods, egg products, non-soy vegetable oil, organic products, soft drinks, bakery ingredients, seafood and frozen foods. For more information on this USDA-endorsed show, please call Sharon Cook/FAS Trade Show Office at 202-720-3425 or [Sharon.Cook@usda.gov](mailto:Sharon.Cook@usda.gov).

## U.S. Lettuce Production and Trade

**U.S. production of lettuce in 2002 is forecast at 4.6 million metric tons, unchanged from the previous year, according to the Economic Research Service (ERS). Head lettuce accounted for the bulk of production, followed by romaine and leaf lettuce. California and Arizona are the two major commercial producing U.S. states. For the 5<sup>th</sup> consecutive year, U.S. lettuce exports have been one of the bright spots for horticultural trade. In 2001, U.S. exports of lettuce were valued at \$195 million, up significantly from \$140 million registered in 1996. Traditionally, Canada accounts for about 80 percent of the total U.S. lettuce exports, followed by Mexico, Japan, Hong Kong, Taiwan and Singapore. Japan offers a unique market opportunity for U.S. lettuce exporters, despite their strict phytosanitary import requirements. U.S. exporters are hopeful that ongoing discussions between Ministry of Agriculture, Forestry and Fisheries (MAFF) and U.S. officials will lead to the establishment of a pilot export pre-clearance inspection program. Under such a program, MAFF plant health inspectors would be situated in the United States for pre-clearance of fresh lettuce to Japan, a development that could substantially boost U.S. sales to Japan. In 2001, U.S. lettuce imports were valued at only \$21 million, with Canada and Mexico accounting for most of the total value.**

### Production

The bulk of lettuce consumed in the United States is produced domestically. There are 3 basic types of lettuce produced: iceberg (also known crisphead or head lettuce), leaf, and romaine. The color for commercial cultivars varies from yellow-green to dark red and many colors in between. The vast majority of U.S. production takes place in just 2 states, California and Arizona. Other important, but smaller, commercial producing states include Colorado, New Jersey and New Mexico. Head lettuce is the leading type of lettuce produced in California, followed at a distance by romaine, which continues to flourish, both in popularity and acreage.

According to the Economic Research Service, lettuce production in the United States in 2002 is forecast at 4.6 million tons, unchanged from last year. Head lettuce accounted for 73 percent of total lettuce produced during 1999-2001, followed by romaine and leaf lettuce with 15 and 12 percent, respectively. Harvested acreage for romaine lettuce has continued to grow from 17,150 hectares in 1999 to 22,700 hectares in 2001, compared to the area for head lettuce which increased only marginally from 78,020 hectares to 78,350 hectares during this same period. Lettuce acreage for 2002, is expected to be slightly lower or about the same as 2001, due to a cold weather snap that occurred in Central California and Arizona in late January of this year.

## Consumption

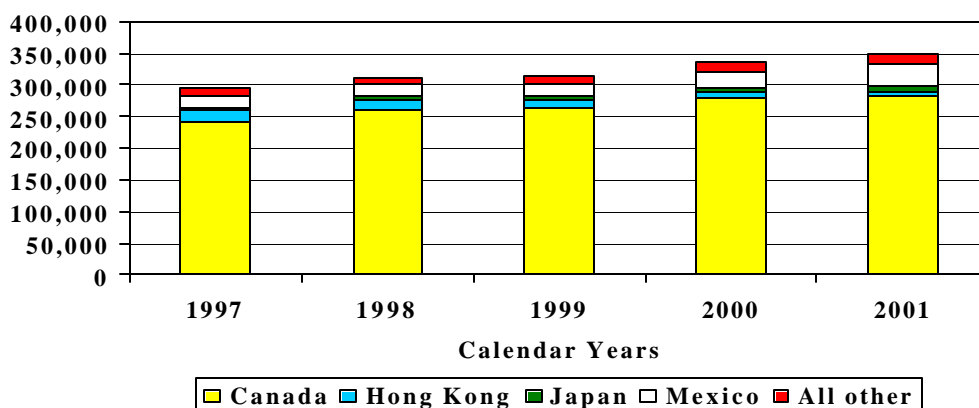
Consumption of lettuce in the United States continues to increase, with per capita use in 2001 reaching a record high of 32.7 pounds, up 2 percent from the year earlier. This increase was due mostly to a record high per capita use of leaf and romaine (8.8 pounds), up 4 percent from the previous year. The main reason for romaine's sustained growth is the continued popularity of Caesar salads plus the inclusion of romaine in a variety of fresh-cut salad products. The enduring popularity of vegetable salads and the convenience offered by fresh-cut salad products has boosted the demand for leaf lettuce. Also, some consumers now opt to replace iceberg lettuce with leaf and romaine lettuce in their home-made salads for added taste, texture, and variety.

## Trade

U.S. lettuce exports continue to be one of the bright spots for horticultural trade, with over 5 consecutive years of growth in volume. During the first 5 months of 2002, U.S. exports of lettuce were valued at \$112 million, up 23 percent in value from the previous year. Canada continued to be the United States best customer, with shipments to that destination accounting for 91 percent of the total export value. Strong economic growth in Canada and higher U.S. prices contributed to the rise in value of lettuce exports. During this same period, U.S. lettuce sales to Japan, the United States second largest market, were valued at \$2.5 million, down 50 percent from the previous year. In 2001, U.S. exports of lettuce to Japan were valued at \$9.2 million, up 53 percent from the previous year.

## U.S. Lettuce Exports to the World

Metric Tons





Japan represents a significant potential market for U.S. lettuce. Japan cannot produce U.S.-type iceberg lettuce because of a high-humidity climate. Fresh, crispy-type iceberg lettuce demand is growing, particularly at Japan's sandwich/hamburger outlets and family restaurants. Because of the growth in Japan's food industry, U.S. exporters are hopeful that ongoing discussions between USDA/APHIS and MAFF officials will result in the approval of a pilot export pre-clearance inspection program. Under this program, MAFF plant health officials would be situated in the United States for the purpose of inspection and pre-clearance of shipments bound for Japan. A pre-clearance program would lessen the risk of shipments running into problems upon arrival in Japan, and could facilitate a substantial increase in U.S. export sales.

### **United States: Lettuce Production and Area**

	<b>Head</b>	<b>Leaf</b>	<b>Romaine</b>	<b>Total</b>
<b>Area Planted</b>				
<b>1999</b> Hectares	79,080	19,970	17,220	116,270
<b>2000</b> Hectares	74,950	20,170	20,050	115,170
<b>2001</b> Hectares	78,590	22,540	22,820	123,950
<b>2002</b> Hectares	NA	NA	NA	NA
<b>Harvested</b>				
<b>1999</b> Hectares	78,020	19,950	17,150	115,120
<b>2000</b> Hectares	74,830	20,030	20,010	114,870
<b>2001</b> Hectares	78,350	22,460	22,700	123,510
<b>2002</b> Hectares	NA	NA	NA	NA
<b>Production</b>				
<b>1999</b> Metric tons	3,189,690	502,400	595,750	4,287,840
<b>2000</b> Metric tons	3,158,260	533,650	718,030	4,409,940
<b>2001</b> Metric tons	3,289,070	532,240	739,030	4,560,340
<b>2002</b> Metric tons 1/	3,265,869	582,419	733,000	4,581,288

Source: National Agricultural Statistical Service. 1/ Forecast by Economic Research Service.

NA = Not Available.

*(For information on production and trade, contact Emanuel McNeil at 202-720-2083. For information on marketing contact Elizabeth Mello at 202-7200-9903.)*

## U.S. Horticultural Exports to Asia

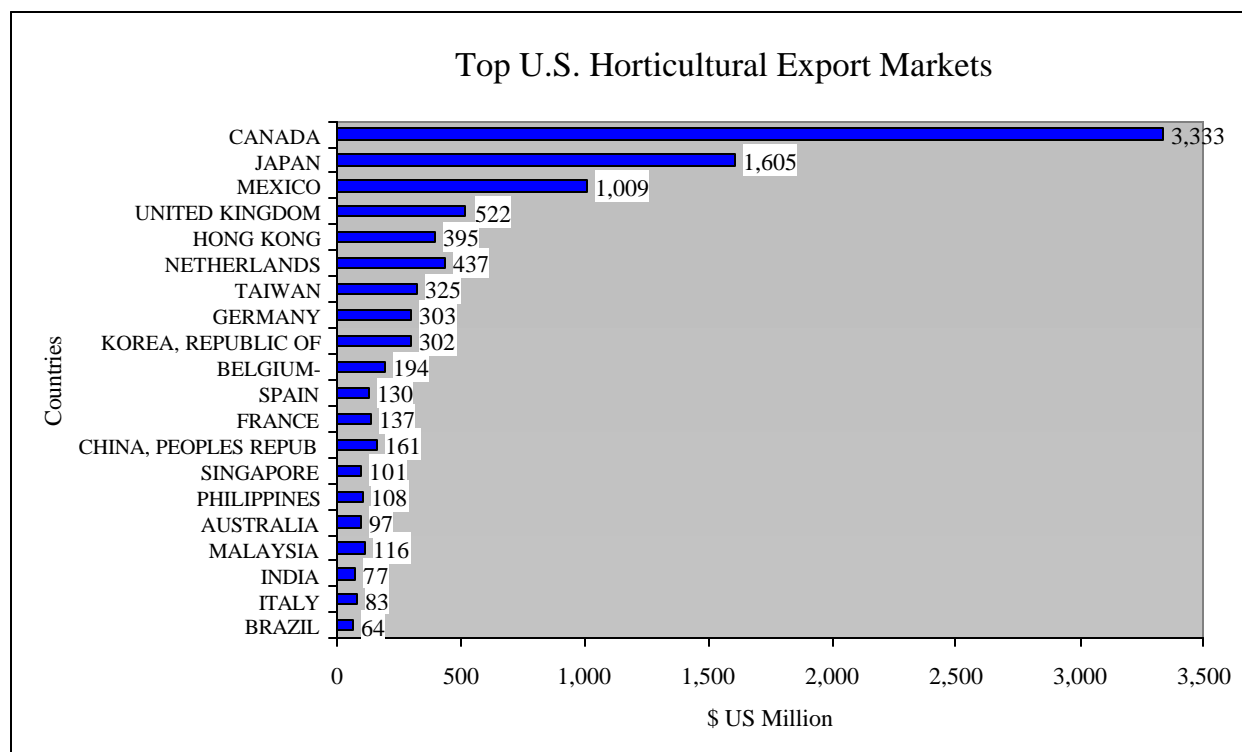
In calendar year (CY) 2001, U.S. horticultural exports to the world totaled more than \$10.9 billion. More than 30 percent or \$3.3 billion of these exports were shipped to markets in Asia. Although U.S. horticultural exports to the world increased slightly in CY 2001, exports to Asia fell nearly 2 percent. Despite the decrease, Asia remains a significant market for U.S. horticultural products, with 9 of the top 20 horticultural export markets located in this region. Japan remains our largest trading partner in Asia accounting for approximately half of U.S. horticultural exports to the region. Other major Asian markets include Hong Kong, Taiwan, South Korea, China, Singapore, the Philippines, and Malaysia.

Leading categories of U.S. horticultural exports to the Asia region include miscellaneous fruits and vegetables, deciduous fruits, frozen vegetables, fresh citrus fruits and edible tree nuts.

### Top Global Horticultural Export Markets

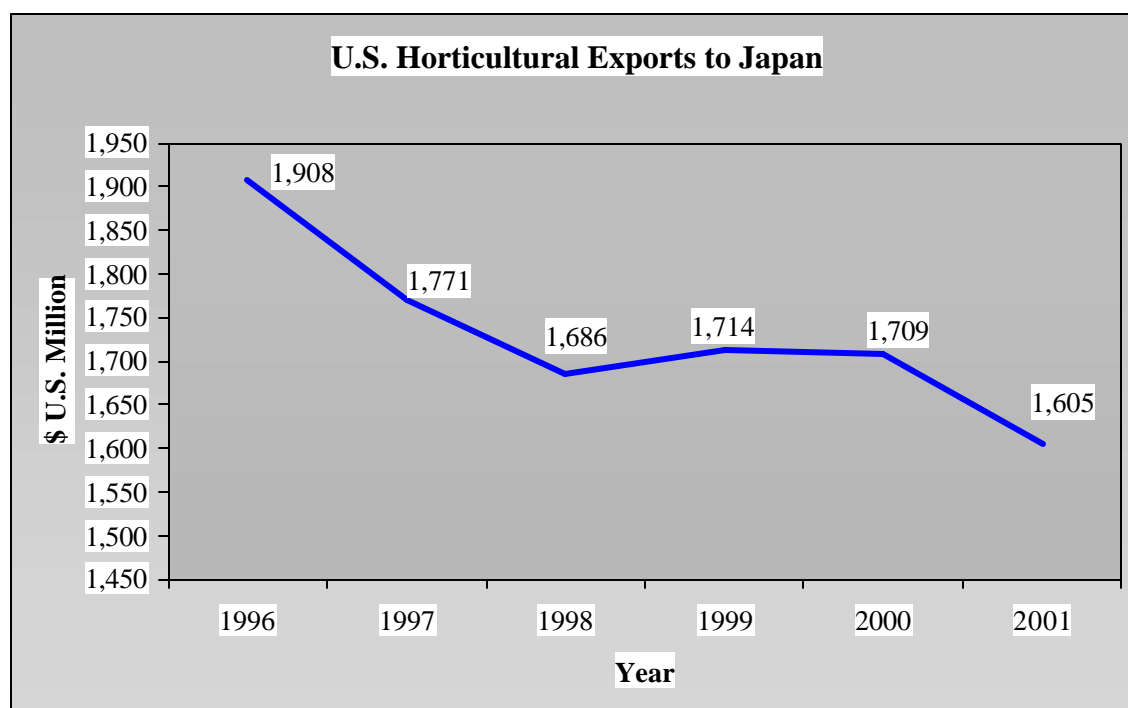
U.S. agricultural exports to the world in CY 2001 totaled more than \$53.6 billion, with twenty percent of U.S. agricultural exports comprised of horticultural products. Countries in Asia made up the second largest market for U.S. horticultural exports behind Canada and Mexico. Last year, Japan, Hong Kong, Taiwan, South Korea, China, Singapore, the Philippines, Malaysia, and India collectively purchased more than \$3.2 billion worth of U.S. horticultural commodities.

### Japan



Japan remains the largest export market for U.S. horticultural products in Asia. In CY 2001, U.S. horticultural exports to Japan reached \$1.6 billion. Continued weakness of the yen versus the dollar, prolonged economic recession, high duties, and increased competition from Europe and low-cost producers, particularly China, are creating serious challenges for U.S. exporters.<sup>9</sup> Economic woes punctuated by the 1997/1998 Asian financial crisis have adversely affected U.S. horticultural exports to Japan, which have gradually declined from a high of \$1.9 billion in 1996 to \$1.6 billion in CY 2001.

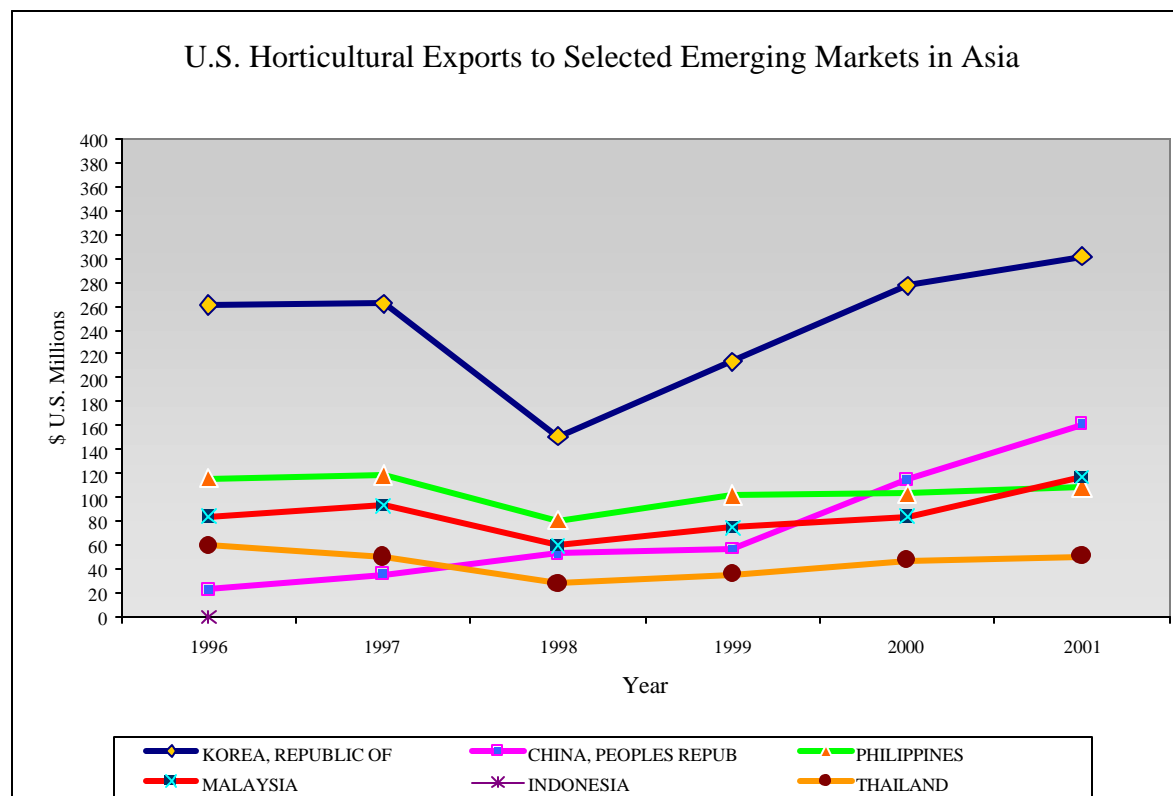
Despite the challenges, Japan remains an important market for American horticultural exports. Last year it imported approximately \$162 million of french fries and \$106 million of fresh grapefruit. Japan's aging and health conscious population provides an opportunity for American producers that export wine, fresh citrus, vegetables and berries.<sup>10</sup>



<sup>9</sup> FAS Attaché Report #JA2514, 3/29/02

<sup>10</sup> FAS Attaché Report #JA2514, 3/29/02

## Emerging Markets



Although U.S. horticultural exports to Japan have declined over the past few years, the emergence of other Asian markets has offset some of these trade losses. Horticultural exports to South Korea, China, the Philippines, Malaysia, Indonesia and Thailand have steadily rebounded from the devastating effects of the Asian financial crisis. Collectively, U.S. horticultural exports to these countries grew by more than 17 percent in CY 2001. During the same period, U.S. horticultural trade to Japan fell by more than 6 percent.

### Republic of South Korea

U.S. horticultural exports to Korea have steadily increased over the past 4 years, from a value of more than \$151 million in CY 1998 to over \$302 million in CY 2001. With a 6.4 percent GDP growth forecast for CY 2002 and a strengthening currency, the outlook for U.S. horticultural product exports is favorable. Similar to last year, miscellaneous fruits and vegetables and fresh citrus fruits were the top U.S. horticultural exports to Korea. In CY 2001, U.S. fresh orange exports totaled 92,483 tons, of which 32,041 tons entered under Korea's Minimum Market Access (MMA) quota. Despite the quota, U.S. orange exports exceeded quota imports for the second year in a row. The United States has a 97-percent share of the MMA quota.<sup>11</sup> Australia, New Zealand, Japan and South Africa are major competitors to U.S. orange exports in Korea.

<sup>11</sup> FAS Attaché Report, GAIN Report #KS2031, 7/8/2002.

## **Peoples Republic of China**

China is one of the fastest growing markets in Asia with U.S. horticultural exports soaring from \$52 million in CY 1998 to more than \$161 million in CY 2001. Its accession to the World Trade Organization and tariff reductions for a wide range of agricultural products should improve market access for U.S. horticultural commodities, including wine, fresh fruits and tree nuts. The movement to Western-style hypermarkets, convenience stores and modernization of its food processing industry also provide additional export opportunities for horticultural products. Exports of miscellaneous fruit and vegetables, particularly edible preparations, enzymes and frozen potatoes were the top U.S. horticultural exports to China in CY 2001.<sup>12</sup>

## **Philippines**

U.S. horticultural exports to the Philippines have risen nearly 34 percent from \$81 million in CY 1998 to approximately \$109 million in CY 2001. A return to political stability is expected to facilitate the recovery of the country's economy. GDP growth for 2002 is forecast at 4.0 to 4.5 percent. Entry of U.S. products to the Philippines is relatively easy given the similarities among both countries' food regulations and labeling requirements.<sup>13</sup> Top U.S. horticultural category exports to the Philippines in CY 2001 include fresh grapes and apples and edible preparations.

## **Malaysia**

Between CY 1998 and CY 2001, U.S. horticultural exports to Malaysia have increased by 97 percent from \$59 million to \$116 million. Tariffs on imported food and beverages are relatively low for the region, ranging from 0-20 percent. Despite being a major producer of tropical fruits and fresh vegetables, Malaysia still imports horticultural products to meet domestic demand. Australia, New Zealand, and China are major horticultural exporters to this market. Nonetheless, its fairly open trade system and trend towards supermarket and hypermarket shopping present opportunities for U.S. horticultural exporters.<sup>14</sup> In CY 2001, U.S. exports of fresh grapes and apples each soared by more than 130 percent. U.S. fresh apple exports rose from \$6 million in CY 2000 to approximately \$15 million last year. Malaysia imported \$37 million of fresh grapes from the United States in 2001 compared to \$15 million the year before.

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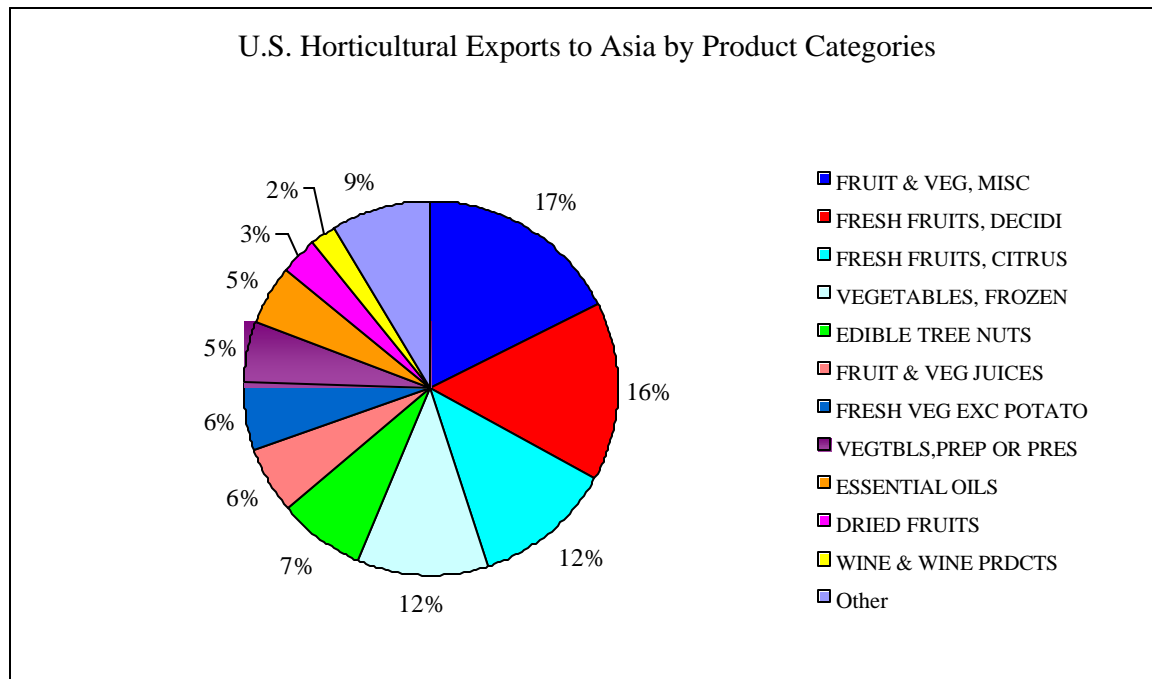
<sup>12</sup> FAS Attaché Report, GAIN Report #CH2808, 3/27/2002

<sup>13</sup> FAS Attaché Report, GAIN Report #RP2053, 7/29/2002

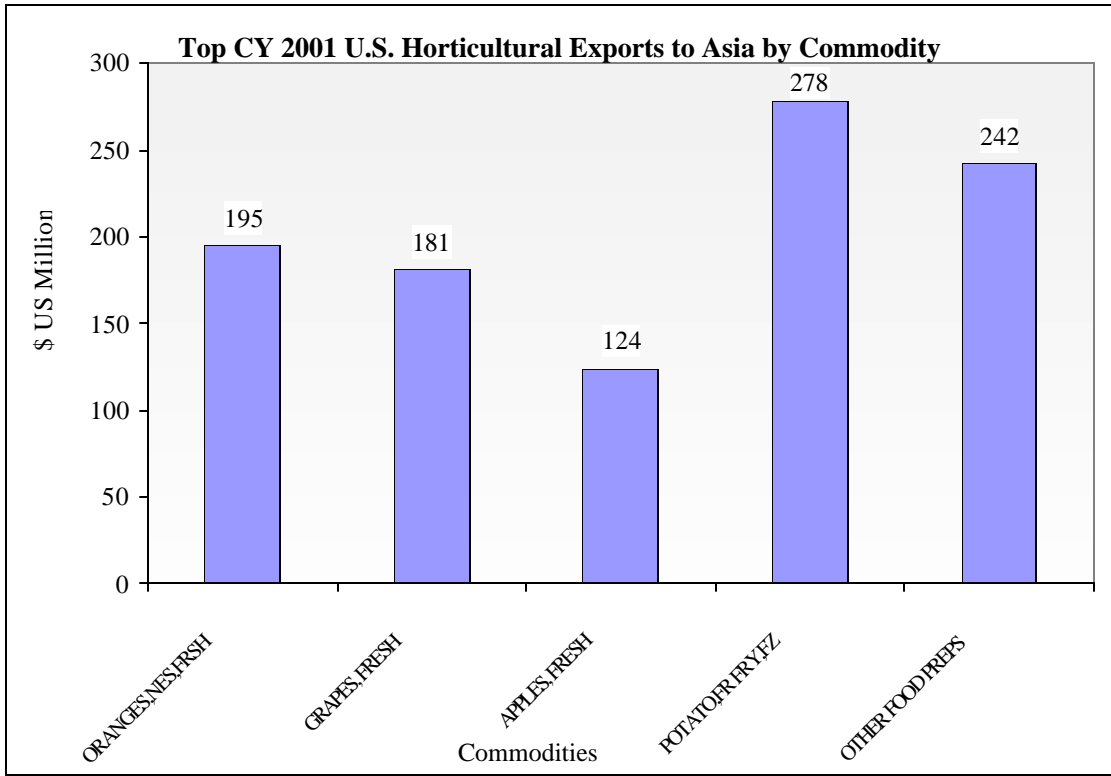
<sup>14</sup> FAS Attaché Report, GAIN Report #MY1063, 11/2/2001

## Top Horticultural Exports

Of the \$3.3 billion of U.S. horticultural trade to Asia in CY 2001, 17 percent (\$566 million) consisted of miscellaneous fruits and vegetables which include edible preparations, food enzymes, and frozen potatoes. The second largest group of horticultural exports to the region was comprised of fresh deciduous fruits such as fresh grapes and apples, which accounted for 16 percent (\$506 million) of the trade, followed by fresh citrus fruits and frozen vegetables.



Frozen potatoes, fresh oranges, and fresh grapes continue to be the largest horticultural commodities being shipped to Asia by U.S. exporters. Japan was the primary destination in Asia for frozen potatoes and oranges in CY 2001. Japan imported more than 58 percent of the frozen potatoes to the region last year, valued at more than \$162 million. It also imported 30 percent of the exports of U.S. oranges to Asia. Taiwan was the largest Asian market for fresh U.S. apples in 2001 purchasing approximately \$46 million or 38 percent of the trade. Hong Kong was the largest importer of U.S. fresh grapes in the region, accounting for more than 37 percent of the total shipments.



## **World Trade Situation and Policy Updates**

### **Commerce Terminates Suspension Agreement on Imports of Fresh Tomatoes From Mexico and Resumes Antidumping Investigation**

On July 30, 2002, the Department of Commerce (DOC) terminated the suspension agreement on fresh tomatoes from Mexico as well as the sunset review of the suspended investigation and resumed the antidumping investigation. This was in response to written notification on May 31, 2002, from Mexican tomato growers/exporters announcing that they had decided to withdraw from the agreement established in 1996. The DOC will reactivate the antidumping investigation from the time of the preliminary determination, originally published on November 1, 1996, and intends to make its final determination in the resumed investigation by December 12, 2002. Customs will require deposits based on the preliminary antidumping margins ranging from 4.16 percent to 188.45 percent. U.S. imports of fresh tomatoes from Mexico were valued at about \$485 million during calendar year 2001. The original suspension agreement, which ran from November 1, 1996 through November 1, 2001, established a reference price of \$0.172 per pound (equivalent to \$4.30 for a 25-pound box) for the July 1 to October 23 period; and \$0.2108 per pound (equivalent to \$5.27 per pound box) for the October 22 to June 30 period).

### **Mexico Reimposes Antidumping Duty on U.S. Apples**

On Friday August 9, 2002, Mexico's Secretariat of Economy (SE) announced a resolution to cancel the U.S./Mexico apple dumping suspension agreement, agreed upon in 1998. With this action, SE reinitiates the antidumping investigation that started in 1997 on imports of U.S. Red and Golden delicious apples. However, SE did not reinstate the previously imposed 101-percent antidumping duty established in 1997, but rather a provisional 46.58 percent rate which was to be applied on imported U.S. product effective August 13. Reportedly, the reestablishment of the dumping investigation comes in response to Mexican concerns over increased U.S. shipments of Golden delicious apples during the current peak marketing season of domestically produced apples. Two companies, Price Cold Storage and Packing and Washington Fruit and Produce, are exempted from paying the antidumping duty. Both companies, however, must certify that the apples are from these companies in order to be exempted from the duty. U.S. apple exports to Mexico were severely hampered by the implementation of the 101-percent antidumping duty imposed in September 1997. The duty was subsequently lifted in March 1998 following the suspension agreement. Reestablishment of the antidumping duties will adversely affect U.S. apple shipments to Mexico, which is the top market for U.S. apples. In marketing year (MY) 2000/01, U.S. apple sales to Mexico totaled nearly 225,000 tons, valued at a record \$125 million. U.S. shipments to Mexico tend to be the lightest during the period September-December, with the bulk of the volume moving between January and August.

### **Commerce Department Issues Preliminary Review Decision on Iranian Pistachios**

On August 6, 2002, the Department of Commerce's International Trade Administration (ITA) issued a preliminary decision under a New Shipper Review of the antidumping duty order on raw pistachios from Iran. The review petition was filed by the Tehran Negah Nima Trading Company (Nima). The ITA assessed a preliminary dumping margin of 120.04 percent. When combined with the existing countervailing duty, Nima's duty will be 162.70 percent for all



shipments of raw pistachios to the United States. The new duty only applies to pistachio shipments from Nima. For all other Iranian shippers of raw pistachios, a 283.80 percent duty will continue to apply (318 percent for roasted product). These original duties were imposed on Iranian pistachio imports in 1986 in response to the dumping and subsidy practices utilized by the Iranian industry. The U.S. Normal Trade Relations duty rate on raw pistachios is 0.9¢ per kilogram for inshell and 1.9¢/kg for shelled. The August 6 ITA decision is just preliminary, and there will be several proceedings before the end of the year where the parties to this review will be able to submit additional information to the ITA detailing Nima's trade. A final determination is expected by the end of the year. Other, similar petitions by Iranian pistachio interests are pending before the ITA and will be proceeding on their own schedules. Iran is the world's largest producer and exporter of pistachios. U.S. imports of pistachios from Iran topped \$40 million in 1984, but fell off to zero following the imposition of the antidumping and countervailing duties in 1986. In 2001, for the first time in many years, the United States reported small levels of pistachio imports from Iran (\$0.25 million).

### **U.S. District Court Finds in Favor of USDA Concerning the Spanish Clementine Lawsuit**

On August 15, 2002, the U.S. District Court for the Eastern District of Pennsylvania found in favor of USDA concerning the Spanish Clementine lawsuit, stating that the Secretary's action to ban Spanish clementines was rational, prudent and in accord with applicable law. Spanish clementine interests, consisting of clementine growers and U.S. importers of clementines, filed the lawsuit on February 28, 2002. They filed suit against USDA for its ban on all imports of Spanish clementines. The ban was put into place on December 5, 2001, after several instances which live Medfly larvae was found in several U.S. states. The plaintiffs had asked the court for a preliminary injunction that would require USDA to permit limited distribution of Spanish clementines, subject to all the conditions currently required by the "work plan" established for shipment and imports of clementines. The court stated in its favorable ruling that the Secretary of Agriculture's action (the ban) was rational, prudent and in accord with applicable law; that she is seeking to implement a regulation which would allow for the safe resumption of clementine imports from Spain; and that there is no basis on the current record to conclude that she is not proceeding conscientiously and within a reasonable time frame.

### **Brazil Requests WTO Dispute Settlement Panel to Review Florida's Equalizing Excise Tax**

On August 16, 2002, Brazil formally requested a Dispute Settlement Panel to review Florida's Equalizing Excise Tax. Brazil claims that the tax is inconsistent with the obligations of the United States under Articles III:1, III:2, and III:4 of the GATT. This formal request follows a number of developments concerning the Equalizing Excise Tax. On March 20, 2002, Brazil requested formal consultations pursuant to Article 4 of the Understanding on Rules and Procedures Governing the Settlement of Disputes and Article XXII of the GATT. Under a previously existing state statute, Florida taxed all orange juice processed in the state from oranges produced in Florida and imported frozen concentrated orange juice (FCOJ) from Brazil and placed the revenue in a trust fund. These funds were used to finance advertising, marketing and scientific research on processed and fresh citrus products. In a parallel development, five multinational citrus processors sued the Florida Department of Citrus, arguing that the Equalizing Excise Tax violates the commerce clause in the U.S. Constitution that reserves to the

Congress the authority to tax imports. WTO consultations were held between the United States and Brazil in May and June 2002. In its request to formally initiate a WTO dispute settlement, Brazil acknowledges that the Florida statute was amended, but that they are unsure as to whether the elimination of the exemption for juice produced in states other than Florida is permanent.

### **U.S. Pear Exports Reached Record Value and Volume**

During the 2001/02 marketing season (July-June), the United States exported more than 170,000 tons of pears, valued at \$98 million, both records. Mexico, with nearly half of the export volume and value, remained the top destination for U.S. pears in 2001/02. U.S. exports to Mexico, however, declined 4 percent in volume to 81,450 tons and 2 percent in value to \$44 million. Shipments to Canada, the second largest buyer of U.S. pears, totaled 50,000 tons, about a third of the export volume, and \$34 million or 35 percent of the valued exported. Combined, Mexico and Canada alone accounted for three quarters of the volume and 80 percent of the value. The Netherlands (5 percent), Venezuela (4 percent), and Sweden (2 percent) completed the top five markets. Ample supplies of good quality fresh-marketed pears, the continued diversion of more processing pears into the fresh market, and continued promotion efforts kept U.S. pear exports strong. Exports have become vital for the success of the U.S. pear industry, generating a significant and growing share of the income of pear farmers.

## **Export News and Opportunities**

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to the U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. In FY 2002, USDA has made available over \$5 billion in credit guarantees to facilitate sales to selected developing countries, Western Europe, Japan, Hong Kong, and Taiwan. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. While USDA does not provide financing, it guarantees payments due to U.S. exporters in case the foreign banks' or importers' default.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

**<http://www.fas.usda.gov/export.html>**

### **GSM-102**

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

### **Supplier Credit Guarantee Program**

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products,

but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

### **GSM-102 and SCGP**

The following tables present the FY 2002 GSM-102 and SCGP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

*(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911).*

## FY 2002 SCGP COVERAGE

Country	Commodity	Announced Allocations	Exporter Applications Received	Balance
		--coverage in millions of dollars--		
Algeria		10.00	0.00	10.00
Azerbaijan		5.00	0.00	5.00
Baltic Region		20.00	0.64	19.36
Caribbean Region		10.00	1.55	8.45
	Wine (180)		0.02	
Central America Region		50.00	23.93	26.07
	Fruit, Fresh (180)		0.20	
Central Europe Region		20.00	0.00	20.00
China/Hong Kong Region		50.00	0.10	49.90
	Wine (180)		0.01	
Egypt		20.00	8.60	11.40
India		25.00	0.00	25.00
Israel		20.00	0.04	19.96
Japan		50.00	0.00	50.00
Kazakhstan		15.00	2.00	13.00
Kenya		2.00	0.00	2.00
Korea		50.00	8.44	41.56
	Fruit, Canned (180)		0.19	
	Fruit, Fresh (180)		8.20	
	Wine (180)		0.05	
Mexico		200.00	135.74	64.26
	Fruit, Fresh (180)		0.03	
	Wine (180)		0.04	
Pakistan		10.00	0.00	10.00
Poland		10.00	0.05	9.95
Russia		20.00	1.81	18.19
	Fruit, Fresh (180)		0.01	
South Africa		10.00	0.00	10.00
South America Region		20.00	1.33	18.67
Southeast Asia Region		150.00	54.98	95.02
	Fruit, Fresh (180)		0.20	
	Fruit Juice (180)		0.01	
	Fruit Juice Concentrates (180)		0.01	
	Wine (180)		0.02	
Southeast Balkans Region		75.00	0.57	74.43
Southeast Europe Region		20.00	0.00	20.00
Sri Lanka		10.00	0.00	10.00
Taiwan		50.00	0.01	49.99
	Wine (180)		0.01	
Turkey		10.00	0.80	9.20
West Africa Region		35.00	5.91	29.09
Western Europe Region		50.00	1.01	48.99
	Wine (180)		0.12	
Yemen		10.00	0.00	10.00

## FY 2002 GSM-102 COVERAGE

<b>Country</b>	<b>Announced Allocations --coverage in millions of dollars--</b>
Algeria	150.00
Azerbaijan	5.00
Baltic Region	15.00
Bulgaria	7.00
Caribbean Region	220.00
Central America Region	250.00
Central Europe Region	10.00
China/Hong Kong Region	300.00
Dominican Republic	25.00
East Africa	5.00
Egypt	100.00
India	25.00
Jordan	40.00
Kazakhstan	10.00
Korea	850.00
Lebanon	10.00
Malaysia	30.00
Mexico	500.00
Morocco	10.00
Nigeria	10.00
Philippines	100.00
Poland	25.00
Romania	25.00
Russia	20.00
South America Region	600.00
Southeast Asia Region	190.00
Southeast Europe Region	25.00
Southern Africa Region	50.00
Sri Lanka	35.00
Thailand	100.00
Tunisia	30.00
Turkey	345.00
West Africa Region	14.00

### Top United States Horticultural Product Exports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

						Oct. - June	Oct. - June
Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	FY 2001	FY 2002
	--- 1,000 Dollars ---						
Almonds	879,032	772,891	696,818	580,815	686,081	510,832	559,988
Essential Oils	622,219	532,623	507,651	591,583	674,581	521,030	552,401
Wine & Wine Prdts.	390,376	510,923	545,287	538,143	549,045	409,932	381,684
Fresh Apples	412,855	328,068	375,869	336,444	414,808	344,093	296,970
Fresh Grapes	313,836	274,953	283,865	332,162	390,008	230,135	225,937
Frz. Potato Fries	294,417	313,209	343,216	339,553	359,847	271,900	262,910
Oranges	308,055	339,114	159,585	268,808	304,577	280,670	247,522
Orange Juice All	305,172	295,564	307,165	290,395	251,098	188,457	231,368
Proc. Tomatoes	229,526	233,209	220,380	221,306	227,450	174,225	173,537
Nursery Products	185,316	220,055	229,737	216,722	215,288	180,230	167,060
Fresh Lettuce	146,640	173,746	157,262	180,099	201,454	162,014	178,467
Beer	341,784	280,088	211,861	177,241	200,866	134,030	125,110
Grapefruit	240,408	189,744	221,443	208,329	199,813	191,300	193,828
Potato Chips	145,468	226,987	257,355	243,824	184,044	142,685	124,431
Walnuts	195,209	153,863	154,449	149,315	175,735	152,342	159,756
Fresh Cherries	140,650	113,556	154,793	169,516	159,852	112,901	104,422
Prunes	138,398	133,732	133,885	131,697	152,507	117,816	104,021
Raisins	204,388	199,733	198,817	145,861	151,155	112,544	108,741
Fresh Tomatoes	123,789	122,345	127,153	148,312	150,890	113,684	103,051
Proc. Sweet Corn	167,490	139,068	148,050	146,591	120,736	95,486	94,779
Total Other	4,838,913	4,765,679	4,864,543	5,121,136	5,292,064	3,953,259	4,016,753
GRAND TOTAL	10,623,941	10,319,150	10,299,184	10,537,852	11,061,899	8,399,565	8,412,736

### Top United States Horticultural Product Exports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - June	Oct. - June
						FY 2001	FY 2002
Fresh Apples	690,595	539,685	664,969	571,860	743,644	623,277	499,447
Oranges	569,739	609,433	247,419	490,867	541,444	495,815	411,278
Frz. Potato Fries	396,738	438,425	468,826	469,287	505,549	381,529	370,025
Orange Juice All	565,332	553,175	554,951	550,888	464,026	347,877	591,027
Grapefruit	484,417	387,216	428,784	390,958	389,629	373,968	382,311
Fresh Onions	265,859	292,328	257,089	333,775	357,446	277,271	227,724
Fresh Lettuce	294,571	303,816	312,563	328,600	350,079	284,928	308,584
Wine & Wine Prdts.	208,786	266,294	274,696	281,475	311,953	232,928	207,608
Fresh Grapes	236,400	214,569	221,158	272,901	303,396	169,784	163,078
Beer	536,362	425,523	330,158	278,522	301,947	195,788	183,123
Proc. Tomatoes	293,112	300,327	264,369	277,277	297,041	226,950	226,083
Almonds	187,953	202,968	200,847	220,099	259,716	187,396	224,899
Fresh Melons	219,695	211,310	247,448	250,860	234,690	128,364	141,000
Fresh Tomatoes	153,657	133,687	148,271	181,892	173,336	119,966	117,026
Pears	126,603	156,807	145,816	162,629	158,333	126,440	140,420
Fresh Broccoli	130,999	126,791	154,514	182,848	157,406	118,417	119,664
Proc. Sweet Corn	203,613	171,294	186,153	187,818	150,693	121,052	109,338
Peaches	103,442	80,023	97,974	113,098	129,292	44,567	46,896
Lemons	120,330	113,392	113,931	106,249	110,373	97,416	89,324
Raisins	115,215	120,741	104,225	83,832	110,035	80,604	81,856

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

### Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - June FY 2001	Oct. - June FY 2002
--- 1,000 Dollars ---							
Beer	1,443,326	1,677,002	1,865,038	2,126,018	2,296,189	1,691,252	1,845,888
Wine & Wine Prdts.	1,629,254	1,829,709	2,150,057	2,271,185	2,284,016	1,707,687	1,909,192
Bananas & Plantns	1,194,458	1,188,442	1,180,227	1,098,409	1,125,986	843,304	867,905
Nursery Products	565,267	632,672	673,194	745,977	789,187	616,378	619,600
Fresh Tomatoes	611,612	735,180	713,121	608,428	755,074	634,029	496,387
Fresh Grapes	386,183	440,659	545,409	518,260	580,879	560,995	663,371
Cut Flowers	572,926	630,067	578,766	623,213	577,480	479,455	446,895
Fresh Peppers	251,908	343,606	324,880	451,848	507,973	423,225	358,185
Cashews	292,315	339,490	390,111	487,687	366,770	269,224	261,898
Frz. Potato Fries	156,831	216,576	252,437	321,914	338,228	248,766	284,088
Essential Oils	322,447	350,086	315,861	309,570	300,148	227,025	242,833
Fresh Melons	226,502	250,921	277,880	259,797	285,714	284,694	263,344
All Apple Juices	354,632	228,735	210,263	278,975	230,401	175,385	176,262
Olives	184,217	181,730	200,293	184,928	204,762	147,523	153,473
Fresh Cucumbers	100,823	154,634	138,241	168,771	200,539	171,807	161,058
All Orange Juices	240,072	211,353	285,947	243,298	185,182	147,704	114,219
Fresh Onions	127,447	151,990	135,574	131,705	168,119	145,586	127,285
Fresh Mangos	123,009	125,047	138,823	142,010	152,097	101,742	114,066
Fresh Pineapple	74,441	83,676	121,679	117,539	151,773	116,557	129,865
Total Other	4,222,577	4,604,941	5,368,446	5,315,151	5,521,799	4,194,866	4,730,660
GRAND TOTAL	13,080,247	14,376,516	15,866,247	16,404,683	17,022,316	13,187,204	13,966,474

1/ Nursery Products excludes cut flowers.

### United States Top Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - June FY 2001	Oct. - June FY 2002
Beer	1,612,379	1,869,577	2,072,394	2,290,532	2,490,362	1,833,840	1,963,059
Wine & Wine Prdts.	432,192	428,664	420,152	481,164	510,722	376,838	441,638
Bananas & Plantns	3,911,294	4,135,832	4,369,283	4,350,838	4,046,727	3,068,889	3,085,430
Nursery Products	2,206,085	2,460,306	2,765,772	2,860,569	2,926,930	1,904,325	1,960,382
Fresh Tomatoes	743,205	856,852	722,591	708,690	868,191	742,421	531,706
Fresh Grapes	857	1,039	978	1,185	1,060	1,039	1,266
Cut Flowers	2,770,092	2,770,186	2,707,948	2,804,568	2,642,815	2,165,550	2,144,611
Fresh Peppers	284,221	319,671	345,444	352,169	346,582	274,775	313,371
Frz. Potato Fries	269,794	353,931	397,455	470,605	519,789	380,571	468,358
Fresh Melons	779,005	860,437	873,032	898,995	878,305	874,899	896,328
All Apple Juices	1,084,986	1,016,823	1,140,355	1,171,502	1,231,801	901,537	1,005,681
Fresh Cucumbers	302,306	327,745	336,045	346,863	373,629	333,597	334,673
All Orange Juices	1,116,798	1,063,239	1,326,231	1,284,749	976,357	762,573	515,680
Fresh Onions	261,088	259,188	246,532	224,080	269,179	227,172	226,731
Fresh Mangos	191,115	188,767	212,992	231,078	229,473	149,331	193,629
Fresh Pineapple	171,253	255,533	272,601	304,207	333,479	267,286	277,061
Fresh Squash	141,192	157,537	151,916	156,520	168,099	160,969	164,065
Frozen Broccoli	169,458	153,962	186,187	164,090	168,988	132,649	144,506
Fresh Apples	168,564	156,700	158,550	170,490	156,593	119,868	129,815

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.



### Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic units	<u>2001</u>	<u>2002</u>		<u>% Change</u>	<u>% Change</u>
		<u>July</u>	<u>June</u>	<u>July\1</u>	<u>Last Month</u>	<u>Last Year</u>
		Dollars/unit				
Grapefruit 2/	Box	5.01	4.16	6.36	52.9%	26.9%
Lemons 2/	Box	16.14	9.52	14.3	50.2%	-11.4%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	4.33	4.13	3.9	-5.6%	-9.9%
Tangelos 2/	Box	0	0	0	n/a	n/a
Tangerines 2/	Box	0	0	0	n/a	n/a
Temples 2/	Box	0	0	0	n/a	n/a
Apples, fresh 3/	Lb.	0.152	0.22	0.206	-6.4%	35.5%
Grapes	Ton	630	920	1000	8.7%	58.7%
Peaches	Lb.	0.288	0.275	0.205	-25.5%	-28.8%
Pears, fresh 3/	Ton	405	337	312	-7.4%	-23.0%
Strawberries, fresh	Lb.	0.689	0.573	0.45	-21.5%	-34.7%
Asparagus 4/	Cwt.	109	98	136	38.8%	24.8%
Broccoli 4/	Cwt.	23.6	28.4	25.2	-11.3%	6.8%
Cantaloupes	Cwt.	19	14	14.4	2.9%	-24.2%
Carrots 4/	Cwt.	22	21.5	21.2	-1.4%	-3.6%
Cauliflower 4/	Cwt.	25.6	32.7	32.9	0.6%	28.5%
Celery 4/	Cwt.	13.5	9.37	10.1	7.8%	-25.2%
Sweet Corn 4/	Cwt.	19.8	17	21.6	27.1%	9.1%
Cucumbers 4/	Cwt.	18.7	17.7	20.6	16.4%	10.2%
Lettuce 4/	Cwt.	16.4	10.5	12.3	17.1%	-25.0%
Onions 4/	Cwt.	15.5	20.7	19.4	-6.3%	25.2%
Snap Beans 4/	Cwt.	59.4	47.1	46.4	-1.5%	-21.9%
Tomatoes 4/	Cwt.	27.4	28.4	29.8	4.9%	8.8%

1/ Preliminary

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Weight per box of citrus.

Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.

Lemons: AZ, CA = 76 Lbs. per box.

Limes: Florida = 88 Lbs. per box.

Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.

Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.